TimePilot PC

TimePilot

Time and Attendance Systems Instruction Manual

TimePilot Standard

TimePilot Corporation
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TimePilot
Time and Attendance Systems

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Introduction

Congratulations and thank you for purchasing a TimePilot time and attendance system. We've worked hard to make it a thorough and easy-to-use system, and we're sure it will cut your payroll processing time by hours and virtually eliminate mistakes.

TimePilot offers three different time and attendance systems, each designed for a different environment:

- **TimePilot Extreme.** Our weatherproof, battery-powered system is designed for outdoor use, although it can be used inside, too. It commonly would be used at construction sites, where the clock is exposed to the elements. The clock is locked down to prevent theft, but can be moved easily to another site when necessary.

- **TimePilot Standard.** This system is intended to replace old-fashioned punch clocks. It consists of a wall-mounted time clock with cable running from the clock to a personal computer or server. Employee clock-ins are transmitted immediately to the computer or server, and supervisors can see at a glance who is in and who is not.

- **TimePilot PC.** This is our completely software-based time and attendance system. Employees click on the image of a time clock on their computer screens to clock in and out. The basic software package includes licenses that allow the program to be installed on up to five computers. (Just like its big brothers, TimePilot Extreme and Standard, TimePilot PC can accommodate up to 2,000 users.) TimePilot PC gives a company lots of options: It could have all of its employees clock in at any of the five PCs running the software; or it could—with the purchase of additional inexpensive licenses—have hundreds of employees clock in at the PCs on their desks.

All three systems use the same core software: TimePilot Central. This means that you can combine our products to create the perfect system for your business—for instance, TimePilot Extremes at your worksites, TimePilot Standard in your shop and TimePilot PC in your office—and if you have a network, all of them will work together seamlessly.

No matter which system(s) you use, the principles behind them remains the same:

1. Employee clock-in and clock-out data, also known as transactions, from all systems are collected in the TimePilot software's database, which can be located on a network server or on a PC's hard drive.
2. At the end of the pay period, the transactions are "extracted" from that database and placed in a separate database, where they are checked and corrected (if necessary) by supervisors.
3. Supervisors use that information to create reports that indicate the exact number of hours each employee worked. The extracted data can be archived on their hard drive,

on a CD or DVD, on an external hard drive or uploaded to storage on the Internet.

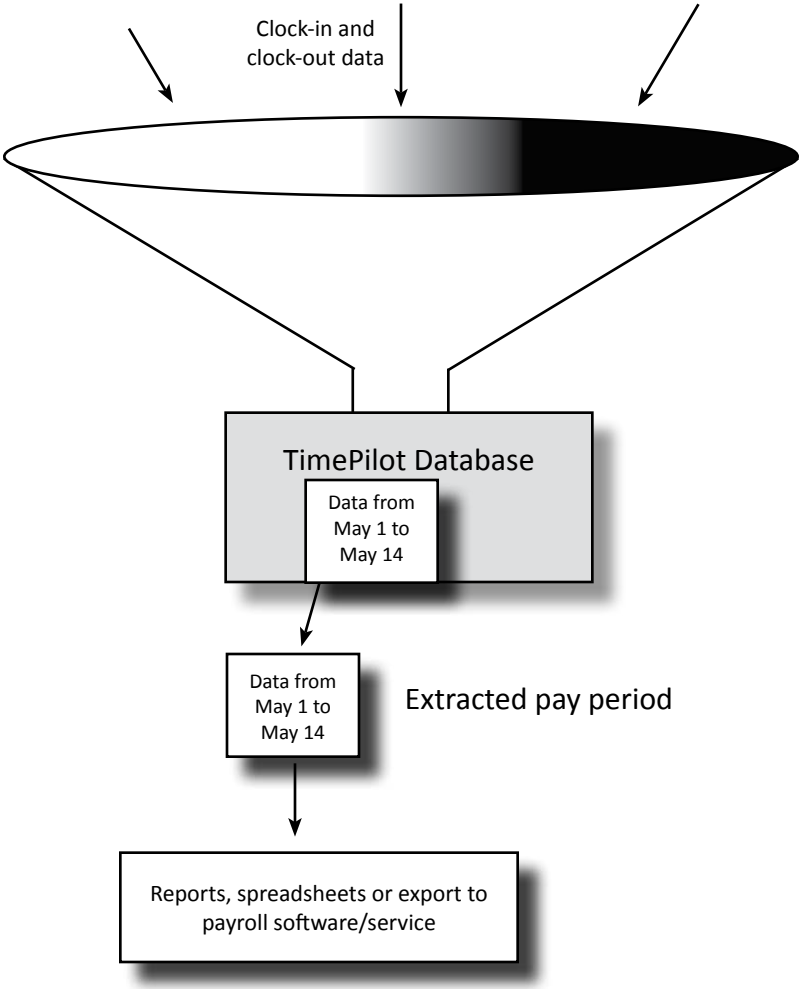
4. The report can be printed, saved as a spreadsheet or exported in a format that can be used by payroll software or a payroll service.

The diagram below illustrates how the system works:

TimePilot Extreme

TimePilot Standard

TimePilot PC


Clock-in and clock-out data
TimePilot Database
Data from May 1 to May 14
Data from May 1 to May 14
Extracted pay period
Reports, spreadsheets or export to payroll software/service

Why so many choices in installation?

We've found that many of our customers use more than one TimePilot time and attendance product. All of our products—TimePilot Extreme, TimePilot Standard and TimePilot PC—can work together, creating one custom system. So, for instance, you can run TimePilot PC in the front office, TimePilot Standard in the back shop and TimePilot Extreme at the job site or on the trucks, with all three systems feeding time and attendance data into one folder on your PC or server.

By including all these choices on your disk, we give our customers the greatest flexibility to install the software they want.

By the way, if you'd like to try TimePilot PC for free for 30 days, you can install it by clicking

TimePilot Tip

For more detailed instructions...

...and definitions of many of the terms in this manual, check out the Help files in the TimePilot software. You can view the help files by clicking the "Help" menu in TimePilot Central.

TimePilot IV Help - Windows Internet Explorer
C:\Program Files\TimePilot Applications\TimePilot Central\Help\index.htm
File Edit View Favorites Tools Help
Favorites
TimePilot IV Help
TimePilot IV Help
Search
If you don't see a series of links here ...
...click this bar and choose "Allow blocked content."
Check out our

“Yes” when you’re asked, “Do you want employees to clock in and out at this computer using the TimePilot PC clock?” After it’s installed, you’ll see a registration screen; simply click the “Evaluation” box and you’re good for the next 30 days.

If you wish to purchase TimePilot PC, call us at 630.879.6400. You will receive the registration code that converts the software from a trial version to the regular retail version, a copy of the program on CD and a printed version of the manual. The setup information entered into the trial version, as well as the data collected, will automatically be transferred to the permanent version of the software.

For more on TimePilot PC, please see Page 19 or visit our web site, www.TimePilot.com.

TimePilot Extreme

How does the system work?

The mounting plate is screwed to a wall, stud, empty junction box or other flat surface. The Extreme time clock is set up with the TimePilot USB drive (as described in the Quick Start Guide), placed on the mounting plate and locked in place with the padlock.

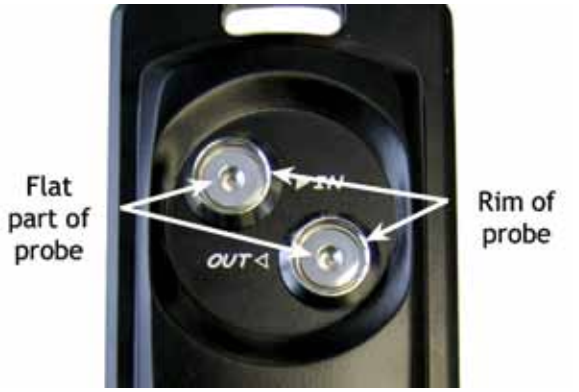
Employees clock in and out with their iButtons (see Page 9 for details) and the clock-in and clock-out data is saved in the clock's memory.

When it's time to do payroll, a supervisor downloads the data onto the TimePilot USB drive and imports it into a PC running the TimePilot Central software. (See Page 11 for details.)

The supervisor uses TimePilot Central to make any necessary corrections or changes to the attendance data, then uses the software to extract the pay period's data and generate reports or prepare the data for payroll.

Clocking in and out

To clock in or out, just touch your iButton to the appropriate iButton probe. You'll hear a "beep" and the light in the probe will flash. The metal part of the iButton must touch both the inner flat surface of the probe as well as the inner rim of the collar. If you touch your iButton to the probe and nothing happens, hold the iButton gently against the probe and slide the iButton slightly to the side, so the iButton makes contact with the rim of the probe.



Collecting and retrieving data

Here's an overview of the process you'll use to collect the time and attendance data from the Extreme time clock(s) and import the data into the TimePilot software:

First, you'll have the time clock(s) download the time and attendance data onto the included USB drive. Then you'll upload data from the USB drive to the PC running the TimePilot software. Data can be collected from multiple clocks before returning to the PC and uploading the data. The data can be also be collected as frequently as desired. Even though your pay period may be weekly or biweekly, you may collect the data every day, if desired.

1. Unlock the padlock securing the time clock to the mounting plate, then insert the USB drive into the USB port on the bottom of the clock. The clock can be removed from the mounting plate to make it easier.
2. Tap the included gray Management iButton to the "In" probe of the clock. The lights on the two probes will begin flashing yellow in an alternating pattern while the clock readies the drive to write data to the USB drive. When complete, the probes' lights will flash green as the clock writes the most recent data to the drive. When the lights stop flashing, a series of beeps will sound, indicating that the data has been written successfully.
3. Remove the USB drive, reattach the clock to the mounting plate (if necessary) and secure the clock with the padlock.
4. Repeat the above steps for each clock you own, if desired.
5. Return to the PC and insert the USB drive into an available USB port on your PC.
6. Run the TimePilot software's "Extreme Data Manager": Click "Start" on the Windows desktop, then "All Programs." Select "TimePilot IV" and then click "TimePilot Extreme."
7. Extreme Data Manager will automatically detect the presence of the USB drive with the TimePilot data files. Follow the screen prompts to import your data into the TimePilot database.
8. View and edit the transactions in TimePilot Central. For more about TimePilot Central, see Page 30.

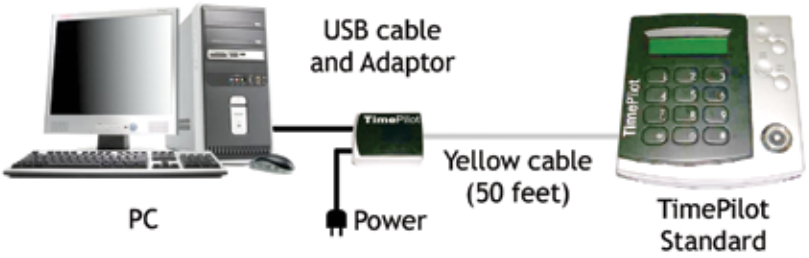
Setting the time on your Extreme time clock

It's important that the time on your Extreme time clock be accurate. You can check the time on the clock when you import time and attendance data into TimePilot Central. If the time on the clock is off, here's how to correct it:

1. Insert the USB drive into the USB port on the PC running the TimePilot software.
2. Run the "Extreme Data Manager": Click "Start" on the Windows desktop, then "All Programs." Select "TimePilot IV" and then click "TimePilot Extreme."
3. Click the icon of the clock you want to change.
4. Click the "Edit" menu and choose "Set Station Date and Time…" from the pop-up menu.
5. The Set Date and Time box will appear.
6. The first option will set the date and time on your time clock to match your PC's clock. Please note that if your time clock is far from the PC, it may take a few minutes to reach the clock and the time will be off by that number of minutes. If that's the case, don't use this option; use the second option.
7. The second option allows you to manually set the date and time. This is a better option if there will be a delay between the time you load the time on the USB drive and the time you get to the time clock.
8. Choose one of the options and click OK.
9. Remove your USB drive and bring it to the time clock.
10. Remove the padlock, plug the USB drive into the time clock and tap your gray Management iButton to the "In" probe.
11. The lights will flash on the clock to indicate that it is being updated. When the lights stop flashing, the process is complete. Remove the USB drive and re-lock the clock with the padlock.

TimePilot Standard

Hardware Installation



Installing the TimePilot system is a simple process--not much different than installing a printer on your computer. The following pages will describe the process in more detail, but here is an overview of the process:

1. Plan the TimePilot system. Where will the time clock be located? Where will the PC running the TimePilot software be located? Will you store your data on your PC or on a server?
2. Run the yellow Communications Cable from the PC to the time clock.
3. Mount the time clock stations and attach the cable to them.
4. Install the TimePilot software.
5. Plug the power supply into an AC wall socket and the USB Adaptor.
6. Plug the cable from the time clock into the USB Adaptor, then plug the USB cable into the adaptor.
7. Plug the USB cable into the PC. The software will find the time clock and start the setup process. Note: Please be sure you have installed the software before taking this step.

TimePilot Tip

Moving your system

If you decide to move your PC or any part of the TimePilot system after completing your installation (for instance, moving the clock from one wall to another), please shut down the PC first, then unplug the power supply from the USB Adaptor. Neglecting to so do could damage your system.

Planning the system

Decide where to put the time clock
Your first step should be to decide where the clock will be located. Usually, this will be either at a central location in your facility or at the employee entrance. The TimePilot station should not be placed outdoors—it is not designed to be exposed to the elements.

The station can be as far as 4,000 feet from the PC. The system comes with 50 feet of cable, but longer lengths of cable can be ordered by calling us at 630.879.6400.

Choose the computer on which you'll be running the TimePilot software.
There are several points to remember when deciding which computer to use:

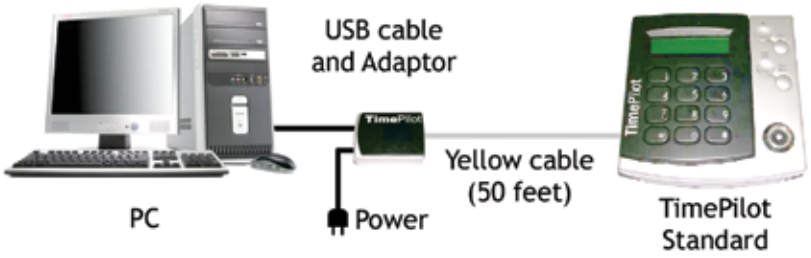
- The TimePilot software on your PC must be running at all times to keep the entire system operating, but the PC can still be used at the same time for other tasks, such as word processing, working with spreadsheets or browsing the Internet.
- The TimePilot data will be used by the person who processes payroll.

    - If you aren't on a computer network, it's probably easiest to connect the TimePilot system to the computer that also runs your accounting package. By doing that, exporting the payroll data from TimePilot and importing it into your accounting program will be a breeze.
    - If you're on a network, we suggest setting up a place on the server to contain the data collected by TimePilot. Make sure the server can be mapped to the computer used by the person handling payroll so they will have access to the data.

TimePilot Standard setup examples

The situation:
A single time clock and a single PC.

The solution:
The TimePilot Standard time clock station is mounted where it's convenient for employees to clock in and out. The cable from the station runs to a PC, where the TimePilot software is installed. This PC must be running at all times for people to be able to clock in and out. The PC is used by the company's office manager, who uses it to keep track of who's in and who's out. When it's time to do the payroll, the office manager uses the PC to prepare the time and attendance data for payroll processing.

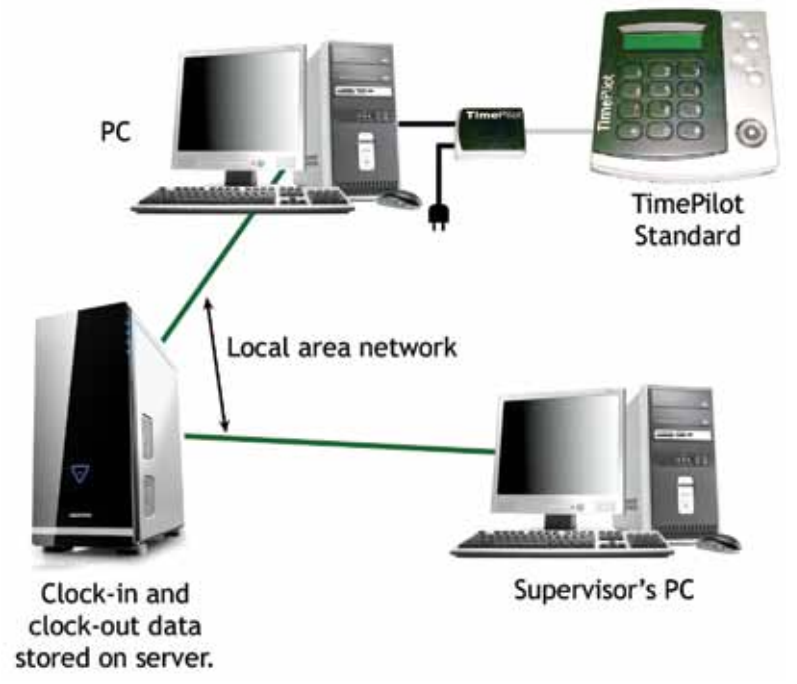


The situation:

A time clock and a single PC connected to a Local Area Network (LAN).

The solution:

The TimePilot Standard time clocks are mounted where it's convenient for employees to clock in and out. The cable from each station runs to a PC that is on the company's local area network. The time and attendance information from each clock is fed from that PC to a mapped drive on the server. When it's time to do the payroll, the payroll manager uses TimePilot Central on his or her PC to prepare the time and attendance data for payroll processing.



Warning

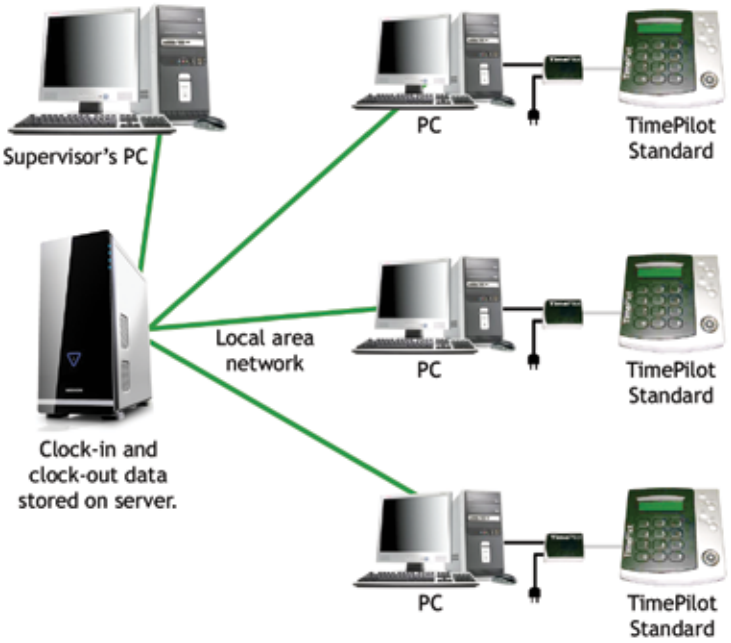
- The Communications Cable is a custom cable. Additional lengths and custom lengths must be ordered from TimePilot only. (See Page 37.) Use of any other cable may damage the unit and will void the warranty.
- The Communications Cable carries a small electrical current. There is a risk of electric shock if you cut or tamper with the cable. You should run the Communications Cable from the USB Adaptor to the TimePilot time clock station with both ends of the cable unplugged.

The situation:

Multiple time clocks connected to multiple PCs on a Local Area Network.

The solution:

The TimePilot Standard time clocks are mounted where it's convenient for employees to clock in and out. The cable from each station runs to a PC that is on the company's local area network. The time and attendance information from each clock is fed from that PC to a mapped drive on the server. When it's time to do the payroll, the payroll manager uses TimePilot Central on his or her PC to prepare the time and attendance data for payroll processing.



Running the cable

Running the cable for the TimePilot system is the next step. Essentially, the cable runs from the time clock to the USB Adaptor.

Warning

The TimePilot Standard time clock station is made for indoor use only. Do NOT mount the station outdoors. It MUST be mounted indoors and protected from outdoor elements. It is NOT waterproof and should not be exposed to water, rain or high amounts of moisture. The time clock also should be protected from spills, chemicals and dirt. If you need an outdoor, weatherproof time clock, check out TimePilot Extreme at www.TimePilot.com.

The following guidelines should be observed:

- Use the cable provided; longer lengths and/or additional cable are available. (For details, see page 37.)
- The station can be as far as 4,000 feet from the PC.
- The cable can be run through walls, over drop ceilings, through attics, etc. When pulling through walls, be careful not to damage the connectors at the ends of the cable or the cable itself.
- The cable should not be run through conduit that includes high-voltage wiring or run over fluorescent lighting ballasts. These may cause electrical interference and affect the transmission of data over the cable.
- In most installations, cable will emerge from the wall behind the station. This is the most secure setup--the cable is not visible to the user and thus there's less temptation to tamper with the system.

Mounting the stations

TimePilot stations may be mounted on a wall or on any other flat surface.

- If you wish to have the time clock sit on a desk, simply swing out the stand from the back of the clock.
- To mount the clock on a wall, use four screws to attach the clock to the wall. The recommended placement on a wall is to have the top of the station 5 feet off the floor. At this level, it's easiest for employees of all heights to see the LCD screen.

The yellow Communications Cable runs from the clock to the USB adaptor. It plugs into either of the two jacks on the back of the clock and into the single jack at the black end of the USB adaptor. You have a choice when running the cable through your facility--it can approach the clock from the top or bottom (use the channels molded into the back of the clock to route the cable) or emerge from the wall directly behind the clock. We suggest having the cable emerge from the wall directly behind the clock to discourage employees from tampering with the cable.

Plug the power supply cable into the silver, rounded end of the USB adaptor and the other end of the power supply into a power outlet. As with all electronic equipment, we suggest using a surge protector to protect your equipment.

Next, plug the USB cable into the USB adaptor. You'll hear a faint "click" when the connection is made. Do not plug the other end of the cable into your computer's USB port until instructed to do so later in this section.

Installing the TimePilot software

Follow the instructions for installing and setting up your software on Page 27, then return here. There are two more quick steps to get your TimePilot Standard system up and running:

Plug in the USB cable

Plug the USB cable from the adaptor into a USB port on your computer. The drivers will install.

Start Hardware Manager—and keep the PC running!

The final step is to start a small program called Hardware Manager that was installed when you installed the TimePilot software. Hardware Manager acts as the go-between between the PC and the time clock and must be running in order for the TimePilot system to operate. In other words, if the computer that's cabled to the time clock is turned off, the time clock system will not work.

To start Hardware Manager, click the Windows Start Button > All Programs > TimePilot IV > Hardware Manager.

Note: TimePilot Central doesn't need to be running—just Hardware Manager.

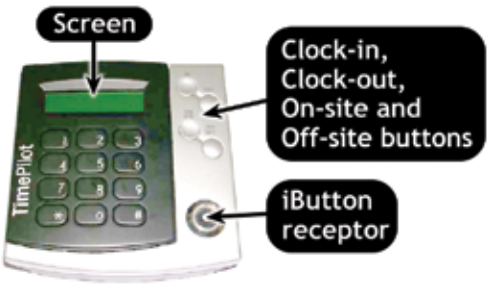
Hardware Manager can run in the background, allowing you to perform other tasks on your PC. To do this, simply click the Hardware Manager's "Hide" button. The Hardware Manager will keep running, but the only sign of it will be the icon in your computer's system tray, as seen at right.

Congratulations! You've completed the setup for TimePilot Standard.

Clocking in and out

Clocking in with the iButton

1. Gently touch the iButton to the receptor on the station until the station emits a beep. The metal of the iButton should touch both the inner and outer rings of the receptor. The screen will display your name and—depending upon how the software is set up—the hours you've worked in this pay period or the date and time you last clocked in.
2. To indicate that you're clocking in, press the "In" button. To indicate that you're clocking out, press the "Out" button.



Clocking in with the keypad

1. Enter your four-digit employee ID number on the keypad. The station will emit a beep and the screen will display your name and the number of hours you've worked in this

pay period.

2. To indicate that you're clocking in, press the "In" button. To indicate that you're clocking out, press the "Out" button.

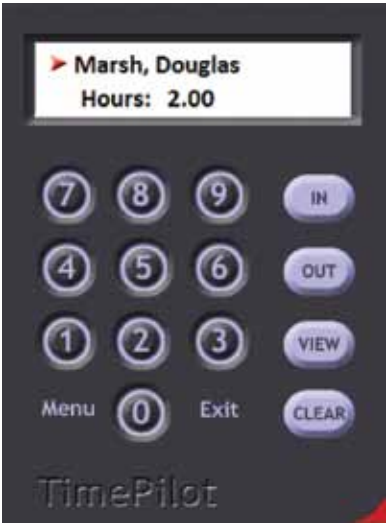
TimePilot Tip

Keeping accurate time

TimePilot Standard and PC take their time from the computer where your TimePilot database is stored. For example, let's say you save your data to a server and use a local PC to process employee hours and run reports. If the time on the server is incorrect, it will be incorrect in TimePilot, too, even if the time on the local PC is correct. To correct the problem, make sure your server has the correct time.

TimePilot PC

The core of TimePilot PC is the "virtual timeclock" (shown at right). This clock appears on your employees' computer desktop, allowing them to clock in and out right at their PC. The clock-in and clock-out data is collected on the PC or at your server and can be manipulated by supervisors using TimePilot Central.



TimePilot PC ships with five licenses, which means the "virtual clock" can be installed on up to five employee PCs. Any number of employees can clock in and out at those PCs. Additional licenses are inexpensive, so you could have dozens of employees clocking in and out right at their desks. (Need more licenses? You can order them at the TimePilot web site, www.TimePilot.com.)

Setting Up TimePilot PC

Users of TimePilot PC have a few extra steps to perform to get their system up and running.

First, like any TimePilot user, you'll install TimePilot Central on the PC that a supervisor will use to work with the time and attendance data collected by the system. Then you'll install the "virtual timeclock" on the PC(s) that employees use to clock in and clock out. If the supervisor's computer will also be used to clock in and out, you'll perform both installations on that PC.

Here's how to install the "virtual timeclocks":

1. Install and set up TimePilot Central on the supervisor's PC, as described on Page 27.
2. Place the CD in the CD drive of the first PC that will run the "virtual timeclock." When the opening screen appears, click "Install TimePilot software."
3. On the next screen, click "TimePilot Installation Wizard."
4. Click "No" when the software asks if you'll manage TimePilot Data from this computer.
5. Click "No" when asked if you want to install Hardware Manager, and "No" again when asked if you want to install the Extreme Data Manager.
6. When the "TimePilot PC Clock" screen appears (screenshot on next page), click "Yes."
7. The Installation Wizard will start up. Follow its instructions to install the clock on the PC.
8. Will you have employees clock in and out by clicking the buttons on the screen with their mouse or with iButtons? If they'll use their mouse, continue to Step 9. If they will use iButtons to clock in and out, you must install the drivers for the Blue Dot Receptor, a device that plugs into a USB port and can read iButtons. Here's how:

Software Install
TIMEPILOT
TimePilot PC Clock
TimePilot PC allows any users to clock in and out at a computer. If you purchased TimePilot PC (or would like to install a free 30-day trial* of TimePilot PC) and you want employees to clock in and out at this computer select "Yes."
Do you want employees to clock in and out at this computer using the TimePilot PC Clock?
No
Yes
*Please see the installation instructions to learn more about the evaluation version of TimePilot PC.
Main Menu
www.TimePilot.com

A. Return to the TimePilot software CD's main menu.
B. Click "Install TimePilot Drivers."
C. Click "Blue Dot Receptor" and follow the instructions that appear.

Blue Dot Receptor

9. After the TimePilot software is installed, you'll see:

A. If you installed just the Virtual Clock: A TimePilot PC icon on the computer's desktop (shown at right). Double-click the icon to start the program.
B. If you installed just TimePilot Central: A TimePilot Central icon on the desktop (shown at right).
C. If you installed both programs: Both icons.

10. When you've finished the installation, double-click the TimePilot PC icon. The software will ask you to select the drive where the time and attendance data collected by this PC will be stored. This should be the same location that you chose for the data when you set up TimePilot Central on the supervisor's computer. Don't remember the location? Start TimePilot Central, and on the opening screen, below the fields for your username and password, the data location is listed.
11. Next, you'll be asked to register your program. The "5-Client TimePilot PC License Number" is on a sticker on the inside cover of your user manual. If you're just trying out TimePilot PC, click the "Evaluation" button to get a 30-day tryout. If you wish to purchase TimePilot PC at any time during the tryout, call us at 630.879.6400. You will

receive the registration code that converts the software from a trial version to the regular retail version, a copy of the program on CD and a printed version of the manual. The setup information entered into the trial version, as well as the data collected, will automatically be transferred to the permanent version of the software.

12. Repeat steps 2-11 for each PC on which you'll install the "virtual clock."

You can see which computers have the virtual clock installed, as well as delete a license from a particular computer so it can be used on another computer, by going to the "TimePIlot PC Administration" item in the Administrative menu in TimePilot Central.

Using TimePilot PC

When employees enter their ID number, their name appears in the field at the top of the clock and the four buttons down the right side, "In," "Out," "View" and "Clear," become active.

- "In" and "Out" are self-explanatory (click "In" to clock in and "Out" to clock out.).
- "View" will show the employee their Current Transactions. This function is optional: See the Options menu below.
- "Clear" will erase a digit if the employee makes a mistake entering his or her ID number.

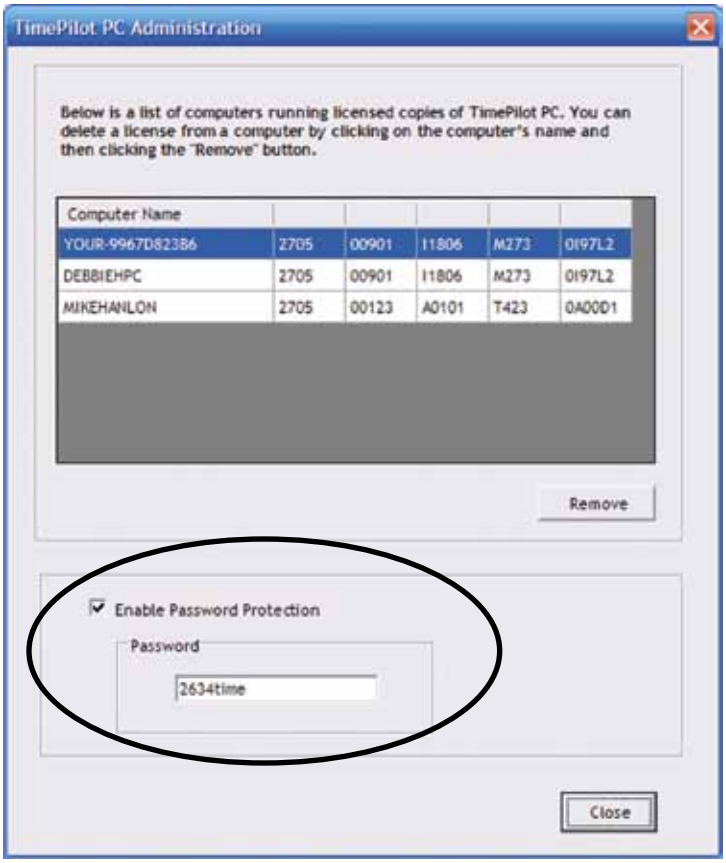
To close the program, click the "Exit" button or press the "Esc" key on your keyboard.

At the bottom left of the screen is the "Menu" button. Clicking the menu button will cause a list of items (see screenshot at right) to appear:

Options

- "View Options" tab
  - ☐ Enable at Startup: Clicking this box will cause the "virtual clock" to appear automatically when the computer is started.
  - ☐ Enable Users to View and Print Their Transactions: If this box is checked, employees can click the "View" button on the "virtual clock" to see and print their transactions. If the

TimePilot Tip


TimePilot PC Administration
Below is a list of computers running licensed copies of TimePilot PC. You can delete a license from a computer by clicking on the computer's name and then clicking the "Remove" button.
Computer Name
YOUR-9967D82386 2705 00901 11806 M273 0197L2
DEBBIEHPC 2705 00901 11806 M273 0197L2
MIKEHANLON 2705 00123 A0101 T423 0A00D1
Remove
Enable Password Protection
Password
2634time
Close

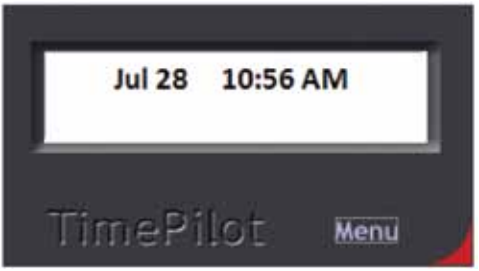
Password-protect your TimePilot PC menu

To keep employees from changing the settings on each virtual clock, you can set a password to allow access to these menu items. To do so, go to TimePilot Central, click the "Administrative" menu, then "TimePilot PC Administration." Check the "Enable Password Protection" checkbox and enter a password.

box is unchecked, the View button won't appear. For the employee to see their transactions, they should identify themselves to the system either with their 4-figit ID number or iButton, then click the "View" button. The employee cannot make any changes to the transactions.

- Minimize Screen after Transaction: Checking this box will cause the "virtual clock" to be minimized after a clock-in or a clock-out. To get the clock back on the screen quickly, you are offered the chance to set a shortcut, for instance, by holding down the "Alt" key and pressing "A."
- Display Keypad: Checking this box will display the "virtual clock" with a full keypad, as shown on the previous page. If you don't check this box, the clock will appear as at the top of the next page. Employees will be required to clock in and out with

their keyboards (See details later in this chapter). They'll still need to use their mouse to click the "Menu" button. When the smaller clock is displayed, you can exit the program by either clicking "Menu" on the clock and choosing "Exit" or simply by pressing the "Escape" key on your keyboard.



- "Restrictions" tab: Checking this box will allow employees to clock in and out with their ID number. If the box is unchecked, they'll have to clock in with iButtons and the Blue Dot Receptor.

Change Data Location

This allows you to change the location of the database where the data collected by this "virtual clock" is stored.

Check for Updates

Checks for updates to the TimePilot PC "virtual clock" software (not for TimePilot Central—to check for updates to TimePilot Central, click the Start button on your desktop, click "All Programs," then "TimePilot IV," then "TimePilot Utilities," then "TimePilot Update Utility."

Minimize

Minimizes the "virtual clock" to the taskbar, and keeps it running.

About

Gives information about the product, including:

- To whom it is licensed.
- The software serial number.
- The software version and build number.
- The application path (the location of the software on your hard drive).
- The data path (the location of the clock-in and clock-out data).

Exit

Quits program.

Clocking in and out

Basic method

1. Using your mouse to click the keys on the "virtual clock," enter your employee ID number. Employee ID numbers can be found by double-clicking the employee's name in TimePilot Central.
2. The employee's name will appear on the TimePilot PC screen, and the "In," "Out," "View" and "Clear" buttons will appear down the right side of the clock.
3. Click the "In" or "Out" button to clock in or out. Clicking the "View" button will show the employee his or her Current Transactions.

Keyboard method—virtual clock with or without keypad

1. Click the “virtual clock” on your screen to make it active, then enter your employee ID number using either the number keys across the top of the computer keyboard or the keypad at the right side of most full-sized keyboards. Employee ID numbers can be found by double-clicking the employee’s name in TimePilot Central.
2. The employee’s name will appear on the TimePilot PC screen.
3. Press the “+” (plus) key to clock in or the “-” (minus) key to clock out. Clicking the “View” button will show the employee his or her Current Transactions.

Clocking in with an iButton

If you’ve set up the system to work with iButtons and the Blue Dot Receptor, here’s how to clock in:

1. Tap your iButton to the Blue Dot Receptor. Your name will appear on the TimePilot PC screen.
2. Click the “In” or the “Out” button on the screen.

   Or

   Press the “+” (plus) key on the computer’s numeric keypad to clock in or the “-” (minus) key on the keypad to clock out.

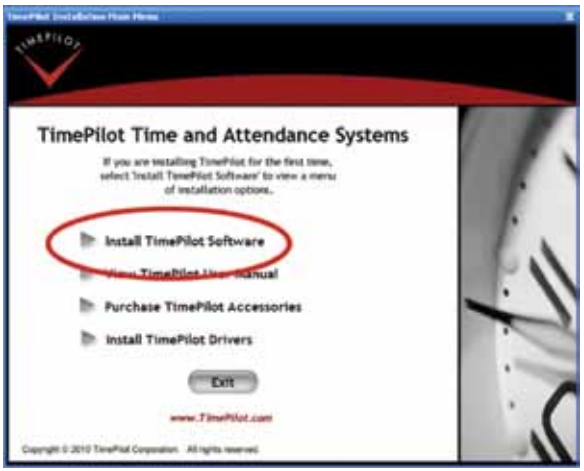
TimePilot Central

In earlier sections, you learned about the hardware part of your TimePilot time and attendance system. Now it's time to learn about the other half: the TimePilot software. The essential functions of the TimePilot software--setting up employees in the system, checking or correcting their clock-in and clock-out data, generating reports--are the same no matter which time clock system you use.

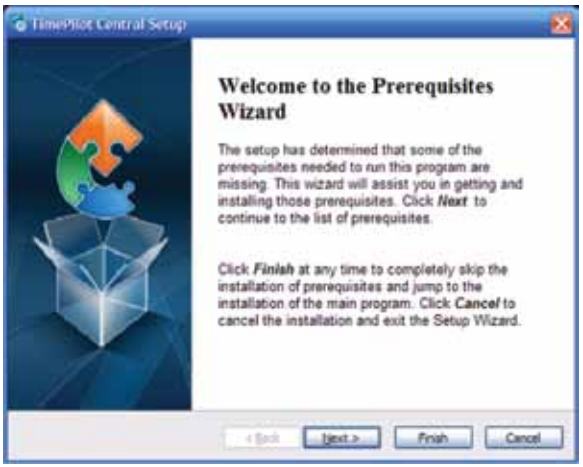
The first step is to install the software.

Installing the software

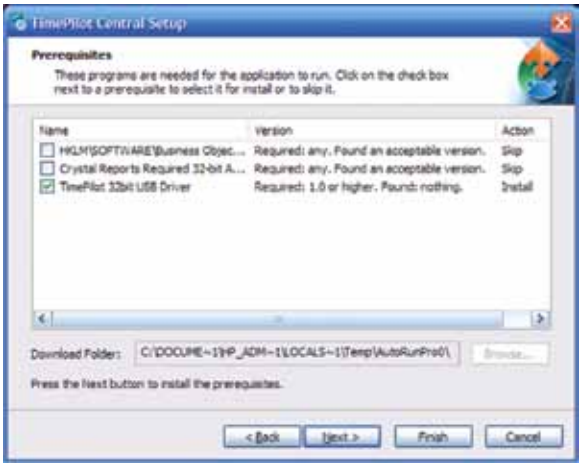
1. Place the CD into your computer's CD drive. The installation program should start up automatically. Click the "Install TimePilot Software" button. (Shown at right.)



2. The program will check your system to see if it already contains the appropriate drivers. If you're missing any drivers, you'll be offered the opportunity to install them now. (Shown at right.)


TimePilot Central Setup
Welcome to the Prerequisites Wizard
The setup has determined that some of the prerequisites needed to run this program are missing. This wizard will assist you in getting and installing those prerequisites. Click Next to continue to the list of prerequisites.
Click Finish at any time to completely skip the installation of prerequisites and jump to the installation of the main program. Click Cancel to cancel the installation and exit the Setup Wizard.
< Back
Next >
Finish
Cancel

3. Click “Next” to see a list of the missing drivers. (Shown at right.)


TimePilot Central Setup
Prerequisites
These programs are needed for the application to run. Click on the check box next to a prerequisite to select it for install or to skip it.
Name
Version
Action
HKLM\SOFTWARE\Business Objec...
Required: any. Found an acceptable version.
Skip
Crystal Reports Required 32-bit A...
Required: any. Found an acceptable version.
Skip
TimePilot 32bit USB Driver
Required: 1.0 or higher. Found: nothing.
Install
Download Folder:
C:\DOCUME~1\HP_ADM~1\LOCALS~1\Temp\AutoRunPro0\
Press the Next button to install the prerequisites.
< Back
Next >
Finish
Cancel

4. Click the “Next” button to install the drivers. When you’re done, click “Finish.”

5. Continue with the installation as guided by the on-screen instructions. When you see the screen at right, click “Exit.”

Installation complete!
You can run the TimePilot Installation Wizard from this disk at any time to install or uninstall any of the TimePilot programs.
Main Menu
Exit
www.TimePilot.com

6. The TimePilot software has been installed and you’ll see the TimePilot Central icon (shown at right) on your desktop.

Setting up the TimePilot Software

Once the software and drivers are installed on your PC, you can start setting up your software. To do so, double-click on the TimePilot Central icon on your desktop.

The first time you start the software, you’ll be asked if you want to create or open a TimePilot database. (Shown at right.) Click the “Create a new TimePilot database...”

button. In the TimePilot system, the database is where all employee transactions are stored. Generally, the database is not kept with the TimePilot software files, much like a letter that you write with word processing software generally is not saved in the same folder as the word processing program.

By keeping the data in a separate location, you can uninstall or install the TimePilot software without affecting the data that the system has collected. (Note: If you're re-installing the software, you may see an existing database listed; if you wish to use that database, click it to highlight it and then click "Open.")

The software will suggest a location for the new database. You can accept that location or change it to any location you want. Once you create your database, you'll set up your company using the TimePilot Setup Wizard.

The TimePilot Setup Wizard

After you set up your database, you'll be taken to the TimePilot Setup Wizard, which guides the first-time user step-by-step through the process of setting up the system. Simply follow the steps, and when you complete a task, the next task will become available.

TimePilot Setup Wizard
Please complete the following items to set up your system. As you complete a section, the next section will become available. All of these settings—as well as some advanced features—can be modified later.
Company
Add a Company...
Create and define your company.
Overtime
Add/Edit Overtime Policy...
Define your overtime policy.
We do not have an overtime policy.
Pay Types
Add/Edit Pay Types...
Create one or more pay types.
Departments
Add/Edit Departments...
Create one or more departments that employees are organized into.
Shifts
Add/Edit Shifts...
Create one or more shift schedules.
We do not plan to use shifts.
Holidays
Add/Edit Holidays Schedules...
Add dates for holidays that your company recognizes.
I will add holidays later.
Employees
Add/Edit Employee Profiles...
Add one or more Employees.
I will add employees later.
OK
Cancel

The seven-step process includes:

1. Add a Company: Here's where you'll enter your company information, including name, your pay cycle (weekly, bi-weekly, etc.), whether you want to have rounding applied to your employees, etc. If you have more than one

TimePilot Tip

Keeping accurate time

TimePilot Standard and PC take their time from the computer where your database is stored. For example, let's say you save your data to a server and use a local PC to process employee hours and run reports. If the time on the server is incorrect, it will be incorrect in TimePilot, too, even if the time on the local PC is correct. To correct the problem, make sure your server has the correct time.

pay cycle, you can create a second “company” with different settings.

2. Add/Edit Overtime Policy: Do you pay overtime to your employees? You can have multiple overtime policies, each with a different set of criteria and payment rates.
3. Add/Edit Pay Types: This is where you’ll set up how your employees will be treated in terms of whether they get overtime, vacation pay, holiday pay, etc. You can have multiple pay types; for instance, one for salaried employees and another for hourly employees.
4. Add/Edit Departments: You’ll enter your company’s departments here. Later, when you’re using the system, you can generate reports grouped by department.
5. Add/Edit Shifts: This is where you create your employees’ shifts. The system uses shift schedules to determine if an employee is early or late.
6. Add/Edit Holiday Schedules: You’ll set up your company holiday schedule here. You can have more than one schedule.
7. Add/Edit Employee Profiles: You’ll add your employees here.

When you finish the process, click OK and the TimePilot Central screen will appear.
Want to add or delete an employee, modify an overtime policy or make other changes to your setup? Click the “Setup” menu at the top of the TimePilot Central screen, and all the categories mentioned above will be available.

Getting started in TimePilot Central

TimePilot Central is the place you’ll be spending most of your time when you use the TimePilot software. In TimePilot Central, which is password-protected, you can set up employees, create or change your company’s policies (overtime, holiday schedule, etc.), monitor employee transactions and generate reports. Let’s take a look at the TimePilot Central screen:
(Note: For a detailed explanation of each item, please see the Help system in TimePilot Central. You’ll find it in the menu bar at the top of the TimePilot Central screen.)

Menus

Across the top of TimePilot Central are eight drop-down menus:

- File: Allows you to export your payroll information to a payroll software package or service (see Page 34 for details) and exit the program.

- View: Lets you customize how your employees and their transactions are displayed in TimePilot Central.
- Periods: This is where you extract a pay period, open Current Transactions or a past pay period.
- Setup: This is where you set up the software to match the work policies your company has. You also add, delete and modify employees here.
- Edit: The items in the Edit menu are used to manipulate employee transactions. Generally, you'll click on the transaction you want to work with in the Transaction List, then click on an item in the Edit menu.
- Reports: TimePilot's Reports function is extremely flexible. You can generate printable reports on a single employee, group of employees or all employees and specify what data you want included in each report. Reports can be printed, converted to PDF format (within TimePilot Central) or exported to Microsoft Excel spreadsheet format (.xls), Microsoft Word format (.doc) or Rich Text Format (.rtf).
- Administrative: This is where you can change your password or time format (from a.m./p.m. to military time) as well as keep track of TimePilot PC licenses (if you use that TimePilot product).
- Help: Want to check to see if there's an update to the TimePilot software? This is where to go. It's also where you can find your software's serial number, version and build number and where it's located on your computer. In addition, you can also find links to several relevant pages on the TimePilot web site as well as the very detailed online help system.

TimePilot Tip

Green or yellow?

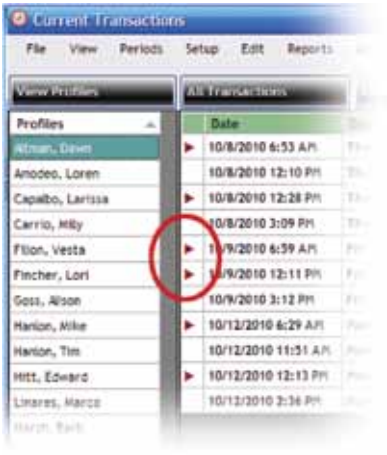
How can you know instantly whether you're looking at a list of Current Transactions or at a Past Time Period? Look at the header in the Transaction List. It will be green in Current Transactions and yellow in a Past Time Period.

Employee List

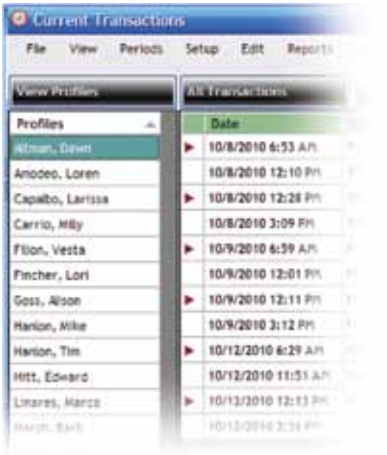
Down the left side of TimePilot Central is the list of all employees in the system, no matter what company they work for.

- Click once on an employee's name to see just his or her transactions. To return to a complete listing, click the "All Transactions" Quick Button.
- Double-click an employee's name to view and edit their employee profile.
- If an employee's name is in red, that indicates that there is an "exception"—the TimePilot system has noticed that there is a clock-in with no corresponding clock-out or vice versa. To correct the problem, click the person's name to see just their transactions. In the list of transactions, clock-ins are identified by a triangle to the

left of the employee's name; clock-outs are blank. A perfect set of transactions for an employee will have lines with a red triangle alternating with blank lines.



You can't see it here because her name is highlighted, but Dawn Altman's name is in red, indicating an exception. When you click on her name, you see two triangles in a row, indicating two clock-ins without a clock-out between them. In this case, Dawn forgot to clock out for lunch on 10/9/10. A supervisor can make a correction easily by inserting an Out transaction with the Quick Buttons (see below).



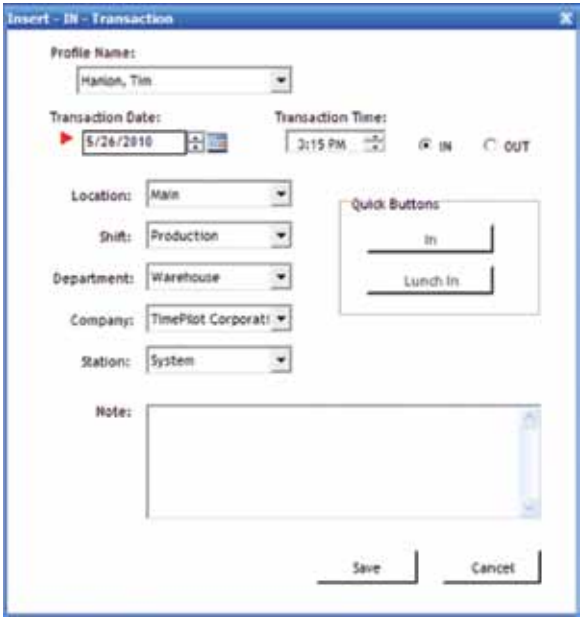
A perfect set of transactions: lines with a red triangle (clock-ins) alternate with blank lines (clock-outs).

Quick Buttons

The Quick Buttons are shortcuts that allow you to make changes to, add or delete transactions, change your view in TimePilot Central and open or extract pay periods. You can use the Edit menu for all of these actions, but the Quick Buttons are faster. Here's how and when each button can be used (see the help files in the TimePilot Central software for even more detail):

- View Profiles/View Transactions: Depending upon what's displayed in the Transaction List, this button switches identities between "View Profiles" and "View Transactions." Clicking "View Profiles" brings up a summary of every employee's profile and changes the button to "View Transactions"; clicking "View Transactions" shows all Current Transactions and changes the button to "View Profiles."
- All Transactions: Displays all Current Transactions in the Transaction List. If you click once on an employee's name in the Employee List, you'll see just that employee's transactions; to return to all Current Transactions, click the "All Transactions" Quick Button.
- Insert IN and Insert OUT: These buttons are often used by supervisors to insert a transaction when an employee has forgotten to clock in or out (see the example above). You'll be able to specify the employee who "owns" the transaction and the date and time of the transaction. In addition, you can indicate the employee's location, shift, department and company, as well as the time clock they used for that

transaction, as shown in the screenshot at right. You also can add a note to the transaction; for example, "Forgot to clock out." To read the note, double-click the note icon (✉) in TimePilot Central. Please note that any changes you make to an employee's location, shift, department or company will appear only with that individual transaction; they won't change the employee's profile.



- Delete: To delete a transaction, first click on it to highlight it, then click the "Delete" button.
- Insert Time: The TimePilot software also allows you to add time to an employee's work hours. This might be done if an employee calls in sick and is paid for sick time. You can also delete time by clicking the "negative" checkbox.
- Open Past Time Period: Need to see a pay period that you've already extracted? Click this Quick Button, then choose the company and the pay period and click OK. You'll know you're in a past pay period by the yellow bar at the top of the screen (Current Transactions—those transactions that haven't been extracted yet—have a green bar.)
- Extract Data: Clicking this button allows you to extract, or remove, all the transactions for a specific company and time period from the Current Transactions and place them in a separate file (database). Extracting your data is a key procedure in the TimePilot system. It's explained further in the next section.

Closing out a pay period

You've set up your clocks and your software, assigned your employees their iButtons and started collecting their clock-ins and clock-outs. Now the pay period has ended and it's time to collect your data and get it ready for payroll. This is where the TimePilot software really shines.

Here's how it works: When your pay period is complete and it's time to process your payroll, you use TimePilot Central to take, or "extract," all the transactions that occurred during that time and place them in a separate file (database). If you need to make any corrections that weren't made during the pay period—if, for instance, an employee forgot to clock in or out—and add transactions for vacations, holidays, etc., to create a complete record of each employee's workweek. Then you can create and print reports for further review. Optionally, you can "export" the file to your payroll service or accounting software.

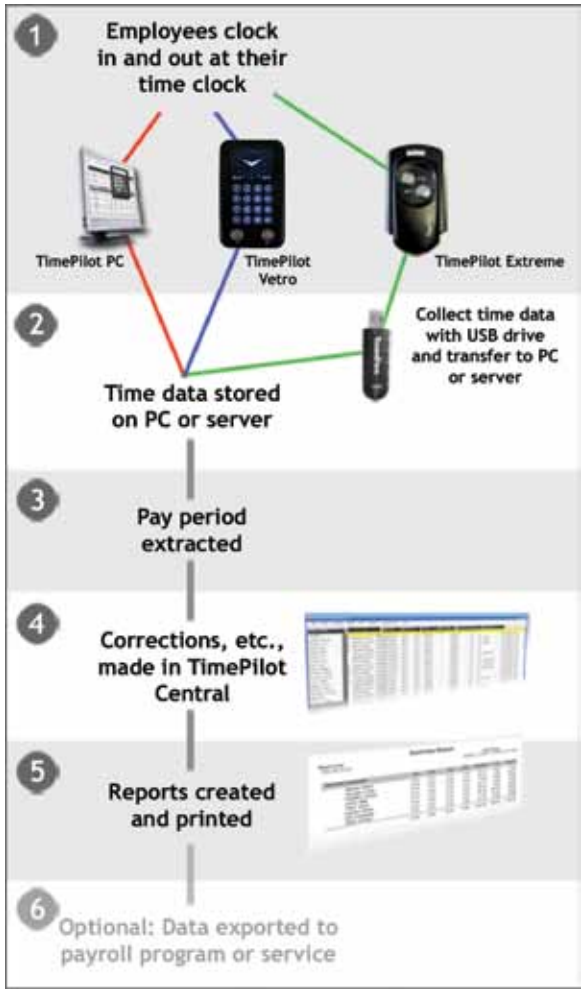
Note: You can also export your data to a spreadsheet (.xls format, commonly used by Microsoft Excel) or word processing document (.doc, commonly used by Microsoft Word, or .rtf, Rich Text Format). In addition, you can print your data or create a PDF version of the data with

TimePilot's built-in tools. For more, see the page on Reports in the TimePilot Central help system.

Getting ready for payroll, step by step

1. Start TimePilot Central.
2. Extract your pay period. (Click on "Periods" in the menu bar, then select "Extract Pay Period.")
   A. You'll be asked if you want to back up your Current Transactions. Click "Yes" and follow the instructions.
   B. In drop-down list at the top of the pay period extraction box (right), choose the company whose pay period you want to extract.
   C. Choose the beginning and ending of the pay period.
   D. Click "Begin Extraction."
   E. Now you'll have the extracted pay period open (look for the yellow bar across the top of the transaction window.)
3. Correct any employee transactions that are erroneous, using the Quick Buttons across the top of the screen. Names in red in the Employee List down the left side of the screen indicate possible trouble spots that the TimePilot software has identified.
4. It's a good idea to also look over each employee's transactions to verify that they make sense. For instance, if an employee clocks in at 8 a.m. on Tuesday, forgets to clock out that night and also forgets to clock in Wednesday morning, but clocks out Wednesday night, the TimePilot software sees a clock-in followed by a clock-out and will not flag the error, unless you set the Alerts feature to flag excessive amounts of time.
5. Insert transactions for vacations, sick days, paid time off and bereavement time, if necessary. This is done manually. The simplest way to do this is to click on the employee's name, then on the "Edit" menu and choose "Insert Amount of Time." Enter the date and amount of time the employee is entitled to and click "OK."
6. Generate a report. Click "Reports" in the menu bar, then choose your report. ("Summary Report" is the most common choice.) If you want a printed copy of the report, click the "Print" button on the left side of the Reports screen. If you want an electronic copy of the report that can be saved or e-mailed, click the "Export" button at the left side of the screen and choose your file format. You can choose from six different formats: Crystal Reports (.rpt), Adobe Acrobat (.pdf), Microsoft Excel (.xls), Microsoft Excel Data Only (.xls), Microsoft Word (.doc), or Rich Text Format (.rtf). When you're done, close the Reports screen to return to TimePilot Central.
7. Optional: Export your data to your payroll software or service. The TimePilot.com web site has available for download many exports that will convert

TimePilot data into a format that can be read by leading payroll services and software packages, like QuickBooks or ADP. To see how to install the export for your service or software, open the Help system in TimePilot Central (in the Help menu at the top of the screen), scroll down to "Definitions" and choose "Exports." To use an export after you've downloaded and installed it, here's the general procedure (see the instructions that came with your particular export for details):



A. Click "File" on the menu bar, then "Export to payroll software."
B. Choose the format for your payroll or accounting program. If that option doesn't appear in the menu, you probably haven't installed any formats.
C. Enter the required information (available from your payroll service or software manual) and click "Export" to create a file that can be imported into your software or e-mailed to your payroll service.

TimePilot Supplies and Services

To order supplies and extra services, please visit the TimePilot web site (www.TimePilot.com) or call TimePilot at 630.879.6400. Available supplies and services include:

For all TimePilot systems:

- Additional iButtons. These iButtons make it simple for you to add employees to your system. iButtons are available in packs of 5, 10, 30, 50, 100 and 200 and in 12 different colors.
- Support contracts. One year of telephone or e-mail support, in addition to the 30 days of free support that start at the time of your purchase.
- Blue Dot Receptors.
- QuickBooks Pro. A discount is offered to TimePilot customers.

For TimePilot Standard:

- Cable. Available both in our stock 50-foot lengths and in custom lengths.

For TimePilot PC:

- Upgrade to TimePilot Standard. Includes necessary items--clock, cable, iButtons, etc.--to add TimePilot Standard functionality to TimePilot PC installations.
- Extra licenses. They come in packs of 5, 10 and 25. Larger installations are also available.

For TimePilot Extreme:

- Additional Extreme time clocks.
- Extreme mounting plates.
- USB drives.
- Management iButtons.
- Extreme padlocks.

Returns/Replacements/Money-Back Guarantee

If you have issues or concerns with items you've purchased, please contact our Technical Support Specialists by calling 630.879.6400 x104 or e-mailing Support@TimePilot.com. We often are able to solve problems over the phone quickly and for free! All of our products include 30 days of free support from the time of purchase.

TimePilot Corporation has a 30-day money-back guarantee and a one-year warranty against hardware defects on all of its systems purchased directly from TimePilot, except TimePilot PC. See below for special rules regarding TimePilot PC.

Return Policy

If you purchased your product directly from TimePilot less than 30 days ago: You may return the system to us for a full refund. See below for the Return Procedure. Note: Special rules apply to TimePilot PC; see below.
If there is a problem with your system, please contact our Technical Support Specialists at the telephone number or e-mail address listed above.

If you purchased your product directly from TimePilot more than 30 days ago: The product cannot be returned for a refund. If there is a problem with your system, please contact our Technical Support Specialists at the telephone number or e-mail address listed above.

If you purchased your product from one of our resellers: Please contact the store where you purchased your item for their return policy. If there is a problem with your system, please contact our Technical Support Specialists at the telephone number or e-mail address listed above.

- Because TimePilot PC consists of software only, we will not accept returns on that product. We strongly suggest you take advantage of the 30-day trial of TimePilot PC that is available for download on our web site. By doing so you will be able to see if the system meets your needs before purchasing it.
- Defective items covered under the one-year manufacturer's warranty will be repaired or replaced. Our manufacturer's warranty is one year after the date of purchase. See the "Product Warranty" section later in this chapter for details.

Return Procedure

- Please request a Return Merchandise Authorization (RMA) number before sending your product back. To do so, please call 630.879.6400 x104 or e-mail returns@timepilot.com. Our returns department is open business days from 9 a.m. to 4:30 p.m. Central time.
- Any product returned to us without prior authorization from TimePilot will be considered an unauthorized return; the customer will not receive credit for the product

and TimePilot will not ship the product back to you.

- Mail your product to:

  Returns Department
  TimePilot Corporation
  340 McKee St.
  Batavia, IL 60510

  The RMA number must appear on all packages and paperwork in connection with the return or your shipment may be refused.

  Note: You must ship the product to TimePilot within 5 days of the date that TimePilot issues the Return Merchandise Authorization number.

- Any costs incurred while shipping returns are the purchaser's responsibility.
- Unless the product is defective or the return is a direct result of a TimePilot error, a minimum restocking fee of 25% of the purchase price paid, plus any applicable sales tax, will be imposed on any item not returned in the original condition it was received. This includes damaged packaging, manuals, accessories or cable.
- Credit card purchases can be refunded to the original credit card number only.
- Purchases made with checks will be refunded by check. Please allow 2 - 3 weeks for processing of all refunds.
- Before you return the product to TimePilot, make sure to back up any data in the device's memory (if applicable) and on any other storage device accessory (USB drive, etc.). TimePilot is not responsible for any confidential, proprietary or personal information, lost or corrupted data or damaged or lost removable media that may be included with your return.
- Issuance of a Return Merchandise Authorization does not bind TimePilot Corporation to accept the return. Final decision shall be made after TimePilot has inspected the returned product.
- In no event will TimePilot Corporation be liable for any special, incidental, indirect or consequential damages whatsoever arising out of the inability to use the product.

Product Warranty

For one year after you purchase a TimePilot product, we will repair or replace (at our discretion) any malfunctioning hardware. The purchaser pays only the shipping to return the malfunctioning part to us. See below for the Warranty Repairs/Replacement Procedure.

This warranty is void if the product is returned in a damaged state for any reason, including damage that occurs because of failure to follow installation instructions. If you choose to use non-TimePilot-supplied cable to connect the Standard time clock to your PC, you could damage your system and will void all guarantees and warranties, express and implied.

Warranty Repair or Replacement Procedure

- Please request a Warranty Return Merchandise Authorization (WRMA) number before sending your product back. To do so, please call 630.879.6400 x104 or e-mail returns@timepilot.com. Our warranty returns department is open business days from 9 a.m. to 4:30 p.m. Central time.
- Any product returned to us without prior authorization from TimePilot will be

considered an unauthorized return; the customer will not receive credit for the product and TimePilot will not ship the product back to you.

- Mail your product to:

  Warranty Returns Department
  TimePilot Corporation
  340 McKee St.
  Batavia, IL 60510

  The WRMA number must appear on all packages and paperwork in connection with the return or your shipment may be refused.

  Note: You must ship the product to TimePilot within 5 days of the date that TimePilot issues the Warranty Return Merchandise Authorization number.

- Any costs incurred while shipping returns are the purchaser's responsibility.
- Before you return the product to TimePilot, make sure to back up any data in the device's memory (if applicable) and on any other storage device accessory (USB drive, etc.). TimePilot is not responsible for any confidential, proprietary or personal information; lost or corrupted data; or damaged or lost removable media that may be included with your return.
- TimePilot has an Advance Replacement program for customers who wish to reduce the amount of time it takes to get their system up and running again. Here's how it works:

  1. Contact TimePilot's Returns Department at the telephone number listed above. Request a WRMA number and tell the specialist you'd like to take advantage of the Advance Replacement Program.
  2. The TimePilot specialist will take your credit card information and ship out a replacement part immediately.
  3. Ship us the defective part. If we receive the defective part within 14 days of the date the WRMA number is issued, we will not charge your credit card. If we have not received the part within 14 days, we will charge your credit card for the cost of the part.

Special-Order Items

Occasionally we'll offer for sale an item that is not necessarily part of our normal product line. Such items are not stocked in our warehouse and are designated as a "Special-Order Item" on our web site. The following rules for these products apply:

- Orders may not be canceled after placement.
- Products cannot be returned unless defective.
- Defective items can be returned for exchange only.
- The products are usually drop-shipped from the manufacturer within 2-3 weeks.

Terms of Sale

TimePilot Corporation reserves the right to limit quantities on any item sold, and to change the pricing of any item at any time without prior notice. As a protection to our customers, when the shipping address differs from the billing address, there may, in some cases, be a delay in the ship date until we can verify that the cardholder and buyer are the same.

Errors on Our Web Sites

We do our best to ensure that the information on our web sites is accurate, thorough and up-to-date. However, there may be instances of inaccurate or incomplete data, including availability and/or price. We make no warranty or guarantee that the information on our web site is current, complete or free from errors. We reserve the right to correct errors and/or update our web site at any time without notice. We reserve the right to refuse or cancel orders containing errors and/or inaccuracies, including those already submitted, whether or not the order has been confirmed and/or your credit card charged. We will issue a full refund to the original pay type if your order is canceled after your payment has been processed.

Questions and comments

If you have any questions or comments about any of the policies described above, please contact us at 630-879-6400 or e-mail us at Sales@TimePilot.com.

Technical Support

For technical support, call us at 630.879.6400 or e-mail us at Support@TimePilot.com. When you contact a TimePilot Technical Support specialist, please have your registration number available. The registration number can be found on a sticker on the inside cover of this manual.

TimePilot Tip

Before you call or e-mail for support...

...you might be able to save some time by checking the help files in the TimePilot Central software. Those files contain many details about our systems and definitions of terms that are used throughout this manual. You can view the help files by clicking the "Help" menu in TimePilot Central.

TimePilot End-User License Agreement

NOTICE TO USER:
THIS IS A CONTRACT. READ IT CAREFULLY. BY BREAKING THE SEAL ON THE DISK ENVELOPE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT. IF YOU DO NOT AGREE WITH THE TERMS AND CONDITIONS OF THIS AGREEMENT, YOU WILL NOT BE ABLE TO USE THE SOFTWARE. IF YOU DO NOT ACCEPT THIS AGREEMENT AND HAVE PROOF OF PURCHASE, YOU SHOULD RETURN THE UNUSED SOFTWARE AND THE TIMEPILOT PRODUCT IN ITS ENTIRETY TO THE PLACE OF PURCHASE FOR A REFUND, WITHIN THE TERMS OF THE RETAILER'S RETURN POLICY.

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